

PLANNING GUIDE FOR A LUNCH & LEARN EVENT

Enclosed in this guide is a list of tasks, questions, and suggestions to aid you in your goal of hosting an amazing Lunch & Learn event!

A photograph of a diverse group of seven people sitting around a table in a modern office setting, engaged in conversation and eating. The image is overlaid with a semi-transparent blue filter. The people are smiling and appear to be enjoying the event.

PLANNING YOUR EVENT CAN BE AN EXCITING TIME! KEEP IN MIND A COUPLE OF THINGS:

- An event like this is not a hard sell. Your clients and prospects are eager for valuable information that will contribute to their success and will be intrigued at the very least.
- As you market this event, specify the fact that it's free, and education-based and that the content will directly contribute to a healthy business.
- Include language in your marketing tactics that communicates an exciting event that your prospects will not want to miss.

PLANNING GUIDE FOR A **LUNCH & LEARN** EVENT



WHAT TO MARKET

Your goal in hosting an event like a Lunch & Learn is to sell your services to new prospects. Choose one of your services that you believe will benefit the majority of your market, and build a campaign around it.

It's a good idea to develop a special promotion on this service for your follow-up campaigns.



WHO TO MARKET TO

Research and target specific qualities of prospects:

- Annual revenue
- Geographical location
- Number of PCs used
- Market verticals

Work with your Chamber of Commerce or other business networks

An 80/20 prospects/clients split is a good balance

Try to get a current, satisfied client at the event. They make for great on-the-spot testimonials!



HOW TO MARKET

Exploit your target market

Target your existing clients to upsell them to your selected service

Purchase new email lists from a reputable source

Set a calendar of when to push out your marketing resources

SUGGESTED MANAGERIAL RESOURCES



PRESENTATION

- Write strong content
- Build professional slides
- Practice delivery

- Use bullet points for clarity and brevity
- Insert relevant images, charts, and graphs



PSA (IF APPLICABLE)

- Create a campaign
- Create a marketing group
- Create tracks

- Nurture leads and deepen customer relationships post-event



WEBSITE ITEMS

- Post topic-relevant blog entries
- Banner ads
- Registration landing page

- Create a thank you/confirmation page
- Add to hidden menu
- Post to events calendar



MANAGE RESPONSES

- Compile a list of attendees
- Retarget to “un-opened”

- Track RSVPs, responses and attendance
- Send material to those that registered but could not attend



EVENT MATERIALS

- Name badges and welcome signs
- Handout packet
- Feedback Card

- Include branded items with a mix of promotional items (e.g., pens, notebooks, stress balls) and informational materials

SUGGESTED MARKETING RESOURCES



EMAILS

- Personalized invitations
- Reminder emails
- Personalized follow-up emails

- Briefly introduce yourself and your company
- Mention the purpose of the event
- Follow up 7-10 days after the event



DIRECT MAIL

- Postcard
- Letter

- Brand to your company
- Provide details on how to RSVP
- Highlight what attendees will gain



SOCIAL MEDIA

- Create posts on company pages
- Take pictures during the event and post follow-up posts

- Schedule posts in advance to save time
- 5-7 branded posts before the event
- Tag any affiliated business



DELIVERABLES

- Registration/attendee handouts
- Checklist/whitepapers
- Feedback form

- Include any special offers
- Make them coincide with the presentation
- Include your contact details on everything



FOLLOW UP ITEMS

- Collect feedback forms
- Send a thank you email

- Reminder of special offers
- Personalize whenever possible
- Ask for future presentation topic suggestions

ADDITIONAL EVENT RESOURCES



DETAILS

- Define the budget for the event
- How many attendees is your goal
- Determine the time and location
- What are your audio/visual needs?

Consider your office as the venue. Offer a quick tour to show off your operations

If a Chamber member, utilize their resources for marketing, food, and venue options

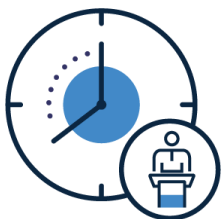


MEAL PREPARDNESS

- Is it catered or will you prepare?
- Use team members as wait staff
- Have a classy food presentation

Always ask for any food restrictions on your registration form so you are prepared to accommodate everyone

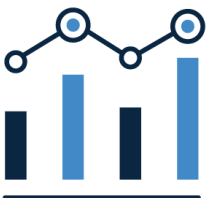
Sample menu: <https://jmct.io/diymenu>



PRESENTATION TIMELINE

- 15 min meet and greet
- 45 min lunch
- 45 min presentation
- 5 min Q&A

Maintain a relaxed atmosphere, but respect your attendee's time



MODIFY TO IMPROVE

- Implement changes from feedback
- Ask your own team for feedback
- Track actual expenses

Your first Lunch and Learn will have a *learning curve*. Take time **that day** to reflect on ways to improve for next time!

JOOMCONNECT CAN HELP YOUR TEAM!



OUR MARKETING TEAM CAN:

Build out the actual presentation with speaking notes

Create marketing: emails, direct mail, social media

Handle printing and sending of direct mailings

Design deliverables for leave-behind

Create whitepapers specific to event for download

Have other ideas? *Lets talk!*

HAVE ALL OF THESE ELEMENTS IN PLACE *BEFORE* YOU START MARKETING YOUR EVENT.

We wish you the greatest amount of success in your campaign!
